

# **USDA Weekly Retail Turkey Feature Activity**

### Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 06/15 thru 06/21.

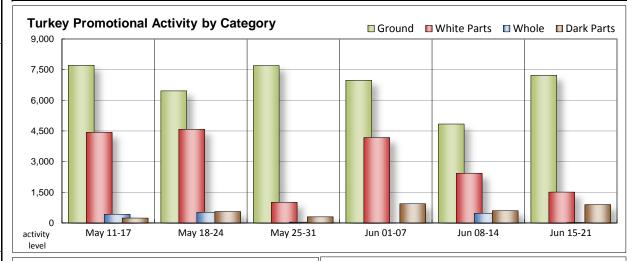
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

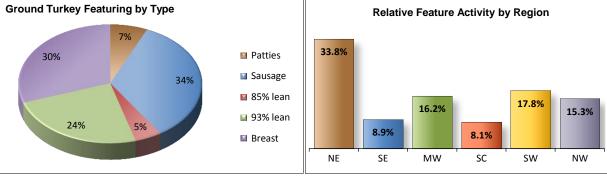
NATIONAL SUMMARY											
	LACT	VEAD									
		WEEK		WEEK		YEAR					
Feature Rate 1/		of 22,500 tlets		of 22,500 tlets	40.3% of 19,500 outlets 4.2%						
Special Rate 4/		.0%		4%							
Activity Index 2/		.880		.830	11,280						
3/	Stores	Wtd Avg	Stores	Wtd Avg		Wtd Avg					
WHOLE BIRDS:											
Fresh - Hens	10	1.49	90	1.62	40	1.49					
" - Toms	10	1.49			40	1.49					
Frozen - Hens			190	1.03	10	1.28					
" - Toms			190	1.03	10	1.28					
PARTS:											
Breast:											
Bone-in, whole											
Fresh	90	_									
Frozen	590	1.69	680	1.95	650	1.86					
Split, bone-in											
Fresh	4.0		400	0.04	700	0.04					
Rotisserie	10		430	-	720	-					
Boneless, whole	20		240		20						
Cutlets	510		620	4.69	740						
Cutlets, thin sliced	100	4.99			130	5.49					
Strips	20	3.99									
Tenders	170	4.18	460	4.78	280	4.38					
Marinated Tenders	660		580		580						
Drumsticks	290		240	_	40	1.62					
Thighs	190		110		10						
Wings	210	1.92	60		30						
Necks			10		20						
Smoked Drumsticks	60		140	_	20						
Smoked Wings	100		30		20	1.99					
Smoked Necks	50		10								
GROUND TURKEY:	7,220		4,840		7,660						
Patties	480		410 490		510						
Sausage 85% lean	2,470 340		610		1,900						
93% lean	1,740		2,700		1,040 2,250						
Breast	2,190		630		1,960						
Rolls (frsh/frz 1 lb.)	1,340		1,320		220						
Specialty 5/	1,340	1.27	1,320	1.54	220	2.30					
Patties	10	3.69	20	4.49							
93-94% lean	220		280		40	3.99					
Breast		3.31	290			0.00					
Note: rolls & specialty no	ot included	d in ground			hted avera	ige.					

This Week's Turkey Feature Highlights

Retailer's attention centers on Father's Day weekend. Turkey feature activity increases slightly. Fresh whole turkey offerings are very light with frozen non-existent. Frozen bone-in breasts offers are similar to the previous week, prices are lower. Fresh bone-in breasts reappear. Rotisserie breasts virtually disappear. Boneless white part offerings decline. Tender and whole boneless breast prices are lower with the balance of white part prices higher. Dark parts increase in viewing. Fresh drums and wings increase in pricing, while the remainder of dark parts are steady to lower. There are several grilling opportunities this week as ground turkey offerings increase. Sausage, ground breast, and 93% lean garner most space respectively. Prices increase for patties and sausage with the balance of grinds offered at lower price levels. Deli activity declines slightly this week. Processor brand thick and thin slicing meat offerings increase; pricing is higher for thick and lower for thin.

Self-service deli promotions decline. Both turkey and chicken 7-10 oz. are seen at higher price levels, while large family packs trend lower.





All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

1/ Feature Rate: the amount of sampled stores advertising <u>any</u> reported turkey item during the current week, expressed as a percentage of the total sample. 2/ Activity Index: a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300). 3/ Stores/Avg: the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. 4/ Special Rate: the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.) 5/ Specialty: products produced from birds raised on an all vegetable diet without antibiotics and minimally processed.



Fri. Jun 15, 2012

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(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

	NORTH	HEAST U.S.		SOUTHEAST U.S.  (AL,FL,GA,MS,NC,SC,TN,VA,WV)  22.4% of 6,000 sampled outlets  0.0% of stores w/ no-price promotions					MIDW	/EST U.S.	
	(CT,DE,MA,MD,M	E.NH.NJ.NY.PA.F	RI.VT)					(IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI)  37.4% of 4,000 sampled outlets  0.0% of stores w/ no-price promotions  Activity Index = 2,080			
Feature Rate 1/		0 sampled outlet	. ,								
Special Rate 4/	0.0% of stores w	•									
Activity Index 2/		Index = 4,790									
Activity index	Price Range	Summar	Activity Index = 1,720 Price Range Summary				Drice Pa			arv	
	(\$/pound)	Stores Wtd Avg		(\$/pound)		Stores Wtd Avg		Price Range (\$/pound)		Summary Stores Wtd Avg	
	(4, 5 0 0 1 1 2)			(4, 12 0 0 0 0 0	,			(4,1,2,3,1		0.0.00	
WHOLE BIRDS:											
Fresh - Hens											
" - Toms											
Frozen - Hens											
" - Toms											
PARTS:											
Breast:											
Bone-in, whole											
Fresh								] :	2.39	20	2.39
Frozen	1.97	10	1.97	1.69 - 1.9	97	200	1.96	1.49 - 1	1.88	370	1.53
Split, bone-in											
Fresh											
Rotisserie	8.99	10	8.99								
Boneless, whole											
Cutlets	3.99 - 5.99	310	5.52	4.9	98	10	4.98	4.49 - 5	5.45	150	4.83
Cutlets, thin sliced	4.99	100	4.99								
Strips											
Tenders									4.79	10	4.79
Marinated Tenders	3.73 - 4.79	530	4.13	4.2	26	40	4.26	3.46 - 5	-	90	5.04
Drumsticks	1.39 - 1.99	60	1.50					1.19 -		40	1.63
Thighs											
Wings								1.19 -	1.29	20	1.23
Necks									0		0
Smoked Drumsticks	1.99 - 2.39	60	2.05								
Smoked Wings	1.89 - 2.39	100	1.98								
Smoked Necks	1.79	50	1.79								
GROUND TURKEY:	-										
Patties	3.29 - 3.99	270	3.67	3.9	99	30	3.99	3.00 - 4	4.19	90	3.61
Sausage	2.49 - 3.99	1,730	3.49	3.48 - 3.9	99	390	3.73	2.80 - 3	3.79	250	3.38
85% lean	2.49 - 2.76	30	2.58	2.33 - 2.4		20	2.41	2.33 - 2	2.50	120	2.38
93% lean	2.80 - 3.84	980	3.14	2.99 - 3.0	)7	480	3.03	3.00 - 3	3.33	170	3.02
Breast (99-100% lean)	3.84 - 4.99	230	4.75	3.84 - 4.7	79	210	3.92	3.49 - 4	4.79	140	4.41
Rolls (frsh/frz 1 lb.)	1.00	120	1.00	1.0	00	340	1.00	1.00 - 2	2.89	580	1.55
Specialty 5/											
Patties								] :	3.69	10	3.69
93-94% lean	3.99 - 4.99	200	4.03						3.33	20	3.33
Breast											





(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

		ENTRAL U.S.			HWEST U.S.		NORTHWEST U.S.  (AK,ID,MT,OR,WA,WY)  35.8% of 1,200 sampled outlets  0.0% of stores w/ no-price promotions  Activity Index = 590			
	(AR,AZ,CO,KS,L	A,MO,NM,OK,TX,	,UT)	(0	CA,HI,NV)					
Feature Rate 1/	22.4% of 4,00	0 sampled outlet	s	35.3% of 2,9	000 sampled outle	ts				
Special Rate 4/	0.0% of stores w	no-price promo	tions	0.0% of stores	w/ no-price promo	tions				
Activity Index 2/		Index = 1,040		Activit	y Index = 1,660					
·	Price Range	Summary		Price Range	Summar	У	Price Range	Summa	ry	
	(\$/pound)	Stores W	/td Avg	(\$/pound)	Stores V	Vtd Avg	(\$/pound)	Stores	Wtd Avg	
WHOLE BIRDS:										
Fresh - Hens							1.49	10	1.49	
" - Toms							1.49	10	1.49	
Frozen - Hens										
" - Toms										
PARTS:										
Breast:										
Bone-in, whole										
Fresh							2.39 - 2.99	70	2.78	
Frozen	1.79	10	1.79							
Split, bone-in										
Fresh										
Rotisserie										
Boneless, whole	3.49	20	3.49							
Cutlets	3.99	20	3.99				5.45	20	5.45	
Cutlets, thin sliced										
Strips	3.99	20	3.99							
Tenders	3.99 - 4.28	90	4.08	3.99	50	3.99	4.79	20	4.79	
Marinated Tenders										
Drumsticks				1.99	190	1.99				
Thighs				1.99	190	1.99				
Wings				1.99	190	1.99				
Necks										
Smoked Drumsticks										
Smoked Wings										
Smoked Necks										
GROUND TURKEY:										
Patties	3.99	50	3.99	3.49	10	3.49	3.99	30	3.99	
Sausage	2.78 - 3.19	40	3.08				3.19 - 3.27	60	3.23	
85% lean				2.33	170	2.33				
93% lean	3.33 - 3.43	60	3.37	2.79 - 2.99	20	2.85	3.19	30	3.19	
Breast (99-100% lean)	3.49 - 4.79	450	4.65	3.99 - 5.19	820	4.57	4.79	340	4.79	
Rolls (frsh/frz 1 lb.)	1.00 - 2.19	280	1.17	1.00	20	1.00				
Specialty <sup>5/</sup>										
Patties										
93-94% lean										
Breast				1						



## **USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats**

Fri. Jun 15, 2012

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 06/15 thru 06/21.

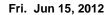
(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	N	ATIONAL	SUMMAR	RY			NORTHEAST U.S.		SOUTHEAST U.S.			
	This	Week	Last	Week	Last	Year	(CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)			(AL,FL,GA,MS,NC,SC,TN,VA,WV)		
5	71.9% o	f 22,500	69.7% o	f 22,500	<b>72.1</b> % o	f 19,500						
Feature Rate 1/	sto	res	sto	res	sto	res	86.7% of 4,400 sampled outlets			72.3% of 6,000 sampled outlets		
Activity Index 2/	42,	760	43,	950	40	010	Activ	ty Index = 14,79	0	Activity Index = 9,340		
Activity index 2/	42,	700	43,0	000	40,	010	Price Range	Sun	nmary	Price Range	Summary	
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	(\$/pound)	Stores	Wtd Avg	(\$/pound)	Stores \	Wtd Avg
SERVICE DELI - Turkey												
Category 1												
Processor Brand	5,340	8.13	5,210	7.77	5,410	7.88	5.99 - 9.99	2,270		6.49 - 8.99	2,180	8.30
Private Brand	1,910	7.81	2,460	7.30	2,920	7.15	6.99 - 8.99	1,660	7.78	7.99	70	7.99
Category 2												
Processor Brand	4,930	6.03	4,800	6.07	2,930	5.89	4.99 - 6.99	2,010		4.99 - 6.99	340	5.97
Private Brand	2,560	6.68	3,050	6.64	3,680	6.51	5.98 - 6.99	560	6.00	5.99 - 6.99	300	6.87
Category 3	000	0.05	4 000	0.04	000	0.00	0.00 4.00	400	4.05	0.00	40	0.00
Processor Brand	280	3.85	1,060	3.94	960	3.99	2.99 - 4.99	130		3.99	10	3.99
Private Brand	1,450	4.97	200	4.69	160	4.99	4.98 - 4.99	200	4.99	3.99 - 4.99	1,220	4.97
Turkey Ham Processor Brand	190	3.67	290	3.89	400	2.69	3.98 - 4.99	110	4.22			
Private Brand	190	3.07	290	3.09	180	3.99	3.90 - 4.99	110	4.22			
Turkey Pastrami					100	3.99						
Processor Brand	100	4.07	310	4.29	50	5.43	4.99	30	4.99			
Private Brand	100	4.07	310	4.29	30	5.43	4.99	30	4.99			
SERVICE DELI - Chicken												
Category 1	2 200	7.04	0.000	7.40	0.000	7.45	5.00 0.00	4.000	7.04	0.00 0.00	570	7.00
Processor Brand Private Brand	3,320 4,100	7.01 7.32	2,600 2,530	7.46 7.12	2,060 1,570	7.15 7.15	5.99 - 8.99 6.99 - 7.99	1,260 1,720		6.99 - 8.99 6.99 - 7.99	570 280	7.22 7.02
Category 2	4,100	1.32	2,330	7.12	1,570	7.13	0.99 - 7.99	1,720	7.09	0.99 - 7.99	200	7.02
Processor Brand	910	6.41	70	5.91	80	5.94	5.99 - 6.89	180	6.86	4.99 - 6.99	360	6.26
Private Brand	1,050	6.87	180	5.98	00	3.34	3.99 - 0.09	100	0.00	4.33 - 0.33	300	0.20
SELF-SERVICE DELI	1,030	0.07	100	5.90								
(dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	7.710	3.17	9,710	3.11	7,800	3.26	2.49 - 3.99	2,010	3.38	2.00 - 3.50	2.010	3.25
Private Brand	820	2.78	890	2.70	2,280	2.96	2.50 - 3.00	400		2.50	40	2.50
Turkey 16 oz	0_0			0	_,	2.00		100				
Processor Brand	270	5.02	370	5.57	2,240	5.42						
Private Brand					•							
Chicken 7-10 oz												
Processor Brand	7,000	3.19	9,230	3.13	5,520	3.23	2.49 - 3.99	1,850	3.42	2.25 - 3.50	1,920	3.29
Private Brand	820	2.78	890	2.70	1,770	2.94	2.50 - 3.00	400	2.81	2.50	40	2.50

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)





## **USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats**

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 06/15 thru 06/21.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	SOUTH C	ENTRAL U.S.	SOUTH	WEST U.S.	NORTHWEST U.S.					
	(IA,IL,IN,KY,MI,MI	N,ND,NE,OH,SD,WI)	(AR,AZ,CO,KS,L	A,MO,NM,OK,TX,UT)	(CA	,HI,NV)	(AK,ID,MT	OR,WA,WY)		
Feature Rate 1/										
	•	sampled outlets		) sampled outlets	,	) sampled outlets	70.9% of 1,200 sampled outlets			
Activity Index 2/		ndex = 8,810		ndex = 5,340		ndex = 2,630	Activity Index = 1,850			
	Price Range	Summary	Price Range	Summary	Price Range	Summary	Price Range	Summary		
SERVICE DELI - Turkey	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg		
Category 1										
Processor Brand	5.99 - 9.99	550 7.48	6.99 - 10.49	240 8.51	7.99 - 9.99	80 9.25	6.99	20 6.99		
Private Brand	5.99 - 9.99	160 8.05	7.99	20 7.99						
Category 2		4.500 5.00	4.00 5.00		4.00	000	500 500			
Processor Brand	4.94 - 6.99	1,500 5.69	4.99 - 5.99	600 5.26	4.99 - 6.99	200 6.69	5.98 - 5.99	280 5.99		
Private Brand	5.88 - 6.99	900 6.58	5.98 - 6.99	610 7.12	7.49	40 7.49	7.49	150 7.49		
Category 3  Processor Brand	2.99 - 4.59	100 3.78	2.99 - 3.99	30 3.18			3.99	10 3.99		
Private Brand	4.99	20 4.99	4.19	10 4.19			3.99	10 3.99		
Turkey Ham	4.33	20 4.99	4.13	10 4.19						
Processor Brand	2.99 - 3.49	50 3.07	2.49	20 2.49	2.99 - 3.29	10 3.10				
Private Brand										
Turkey Pastrami										
Processor Brand	2.99 - 3.98	40 3.44	3.98	30 3.98						
Private Brand										
SERVICE DELI - Chicken										
Category 1										
Processor Brand	4.99 - 7.99	740 6.39	5.99 - 9.49	510 7.18	5.99 - 6.99	190 6.11	6.99	50 6.99		
Private Brand	5.98 - 7.99	320 7.15	6.99 - 7.99	590 7.35	6.99 - 7.99	550 7.50	7.99	640 7.99		
Category 2  Processor Brand	4.58 - 6.99	330 6.26	6.99	40 6.99						
Private Brand	5.98 - 6.99	550 6.54	5.98 - 7.99	440 7.20	7.49	40 7.49	7.49	20 7.49		
SELF-SERVICE DELI	5.96 - 6.99	550 0.54	5.96 - 7.99	440 7.20	7.49	40 7.49	7.49	20 7.49		
(dollars per tub or pouch)										
Turkey 7-10 oz										
Processor Brand	2.00 - 3.50	1,560 2.95	2.49 - 3.00	900 2.70	2.50 - 3.99	890 3.39	2.79 - 3.99	340 3.13		
Private Brand	2.50 - 3.39	240 2.64	3.00	140 3.00						
Turkey 16 oz										
Processor Brand	4.78 - 4.99	20 4.92	4.88 - 5.29	250 5.03						
Private Brand										
Chicken 7-10 oz										
Processor Brand	2.00 - 3.50	1,490 2.96	2.49 - 3.00	770 2.69	2.99 - 3.99	630 3.41	2.79 - 3.99	340 3.12		
Private Brand	2.50 - 3.39	240 2.64	3.00	140 3.00						

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)